

Appendix M – EBT Work Plan Framework

Work Plan Framework

Recognizing the size and complexity of a California statewide EBT implementation and the critical importance of work plans in planning, managing and tracking implementation activities throughout statewide implementation, the State has developed a work plan framework that contains all work plans required by the ITP. The work plans within the framework are organized according to the phases, subprojects and county implementation phases described in the ITP.

The framework contains the following work plans:

File Name	Work Plan Name	County Code	Region
EBT-Template	County Implementation Work Plan Template		
EBT-Template (Pilot)	Pilot County Implementation Work Plan Template		
EBT-PMP	EBT Project Management Work Plan		
EBT-SIP	EBT Statewide Implementation Work Plan		
EBT-Batch	Standard Batch Implementation Sub-project Work Plan		
EBT-Leader	LEADER Host-To-Host Implementation Sub-project Work Plan		
EBT-CalWIN	CalWIN Host-To-Host Interface Migration Sub-project Work Plan		
EBT-ISAWS	ISAWS Host-To-Host Implementation Sub-project Work Plan		
EBT-CIV	C-IV SAWS Host-To-Host Implementation Sub-project Work Plan		
EBT-01	Alameda County Implementation Work Plan	01	5
EBT-02	Alpine County Implementation Work Plan	02	3
EBT-03	Amador County Implementation Work Plan	03	3
EBT-04	Butte County Implementation Work Plan	04	2
EBT-05	Calaveras County Implementation Work Plan	05	3
EBT-06	Colusa County Implementation Work Plan	06	2
EBT-07	Contra Costa County Implementation Work Plan	07	5
EBT-08	Del Norte County Implementation Work Plan	08	2
EBT-09	El Dorado County Implementation Work Plan	09	3
EBT-10	Fresno County Implementation Work Plan	10	3
EBT-11	Glenn County Implementation Work Plan	11	2
EBT-12	Humboldt County Implementation Work Plan	12	2
EBT-13	Imperial County Implementation Work Plan	13	4
EBT-14	Inyo County Implementation Work Plan	14	3
EBT-15	Kern County Implementation Work Plan	15	4
EBT-16	Kings County Implementation Work Plan	16	3
EBT-17	Lake County Implementation Work Plan	17	2
EBT-18	Lassen County Implementation Work Plan	18	2
EBT-19	Los Angeles County Implementation Work Plan	19	1
EBT-20	Madera County Implementation Work Plan	20	3
EBT-21	Marin County Implementation Work Plan	21	2
EBT-22	Mariposa County Implementation Work Plan	22	3
EBT-23	Mendocino County Implementation Work Plan	23	2
EBT-24	Merced County Implementation Work Plan	24	3
EBT-25	Modoc County Implementation Work Plan	25	2
EBT-26	Mono County Implementation Work Plan	26	3
EBT-27	Monterey County Implementation Work Plan	27	3
EBT-28	Napa County Implementation Work Plan	28	2

EBT-29	Nevada County Implementation Work Plan	29	2
EBT-30	Orange County Implementation Work Plan	30	4
EBT-31	Placer County Implementation Work Plan	31	3
EBT-32	Plumas County Implementation Work Plan	32	2
EBT-33	Riverside County Implementation Work Plan	33	4
EBT-34	Sacramento County Implementation Work Plan	34	3
EBT-35	San Benito County Implementation Work Plan	35	3
EBT-38	San Francisco County Implementation Work Plan	38	5
EBT-39	San Joaquin County Implementation Work Plan	39	3
EBT-40	San Luis Obispo County Implementation Work Plan	40	4
EBT-41	San Mateo County Implementation Work Plan	41	5
EBT-42	Santa Barbara County Implementation Work Plan	42	4
EBT-43	Santa Clara County Implementation Work Plan	43	5
EBT-44	Santa Cruz County Implementation Work Plan	44	5
EBT-45	Shasta County Implementation Work Plan	45	2
EBT-46	Sierra County Implementation Work Plan	46	2
EBT-47	Siskiyou County Implementation Work Plan	47	2
EBT-48	Solano County Implementation Work Plan	48	5
EBT-49	Sonoma County Implementation Work Plan	49	5
EBT-50	Stanislaus County Implementation Work Plan	50	3
EBT-51	Sutter County Implementation Work Plan	51	2
EBT-52	Tehama County Implementation Work Plan	52	2
EBT-53	Trinity County Implementation Work Plan	53	2
EBT-54	Tulare County Implementation Work Plan	54	3
EBT-55	Tuolumne County Implementation Work Plan	55	3
EBT-56	Ventura County Implementation Work Plan	56	4
EBT-57	Yolo County Implementation Work Plan	57	3
EBT-58	Yuba County Implementation Work Plan	58	2

The work plans are Microsoft Project98 files containing all project life cycle phases, implementation sub-projects, implementation sub-project components, county implementation phases and eligibility system interface acceptance tests/pilots required by the ITP. For each phase, sub-project component, county implementation phase and eligibility system interface acceptance test/pilot in the work plans, “placeholder” tasks have been included. For the work plans listed below, Bidders shall replace all “placeholder” tasks with the activities, tasks, subtasks, readiness determinations and milestones necessary to perform the work as required by the ITP. Bidders shall 1) Copy all work plans contained on the compact disk (CD) provided with ITP Appendix M; 2) Update the work plans listed below; 3) Copy all updated work plans to a CD (include original versions of work plans that were not updated); and 4) Submit the CD with the final proposal.

Guidelines For Completion and Submission Of Work Plans

1. General Instructions

- Copy the "EBTPlans" directory from the CD directly to a personal computer drive (i.e. C:, D:, or E:, etc.). Do not place it under another directory or in another folder.
- In Windows Explorer, right click each of the work plans listed below, select "Properties" and deselect "Read Only".

- For the linkage between work plans to function properly, the work plans must always be opened from the "EBTPlans\Repository" folder using the "Open Files" dialog box in Microsoft Project.
- Always select "All" then "Close" when presented with a "Links between Projects" window (only appears when a work plan is opened and only if a predecessor task from a linked work plan has been changed) as this applies updates to the work plan from other work plans to which it is linked.
- When activities, tasks, subtasks, readiness determinations and milestones are added to the work plans, copy down the values from the placeholder task in the "Plan", "Phase", "Component", "Reg" (=region) and "Cnty" (=county) columns.
- When tasks, subtasks and readiness determinations are added to the work plans, also enter the Contractor, County and State entities that will be performing the work.
- When tasks, subtasks and readiness determinations are added to the work plans, also enter the estimated duration.
- Enter dependencies between all tasks, subtasks, readiness determinations and milestones added to each work plan.
- Enter a dependency between the final task, subtask or milestone in each section of the County Implementation Work Plan Template and the provided "concluded" milestone at the end of each section.

2. Updating The County Implementation Work Plan Template - *EBT-Template (Pilot)*

- **NOTE: All activities, tasks, subtasks, readiness determinations and milestones placed in the County Implementation Work Plan Template must be preceded by "xxx ". When the template is used to create a county implementation plan the "xxx" will be replaced by the county name.**
- **NOTE: The County Implementation Work Plan Template must contain all tasks for implementing EBT in any county and must contain tasks for all options a county will be presented with (i.e. Over-The-Counter conversion and training and Mail-Based Conversion and Walk-in Training, etc.) When the customized county implementation work plan is developed for each county, any unnecessary tasks from the County Implementation Work Plan Template will be deleted.**
- Replace "#26 Placeholder (M/S – Milestone Dates)" with any milestones necessary to control implementation of EBT in a county.
- Replace "#27 Placeholder" with all administrative activities, tasks, subtasks and milestones necessary to start and/or execute EBT implementation in a county.
- Replace "#29 Placeholder" with all Readiness Phase activities, tasks, subtasks, readiness determinations and milestones for a county implementation.
- Replace "#32 Placeholder" with all Planning & Installation Phase activities, tasks, subtasks, readiness determinations and milestones for a county implementation.
- Replace "#34 Placeholder" with all eligibility system interface acceptance test activities, tasks, subtasks, readiness determinations and milestones for a county implementation.
- Replace "#38 Placeholder" with all Implementation Phase activities, tasks, subtasks, readiness determinations and milestones for a county implementation.

- Replace “#41 Placeholder” with all Pilot Evaluation Phase activities, tasks, subtasks, readiness determinations and milestones for an eligibility interface acceptance test of a pilot county implementation.
3. Updating The Pilot County Work Plan - **EBT-01**
 - Copy the corresponding tasks that were added to the County Implementation Work Plan Template to the placeholder tasks in the Alameda County Work Plan.
 - Copy down **Alameda** in the "Phase" column of the new tasks, **5** in the "Reg." column and **01** in the "Cnty." column.
 - Select "Edit" then "Replace" to replace "xxx" with **Alameda**.
 4. Updating The Standard Batch Implementation Sub-project Work Plan - **EBT-Batch**
 - Replace “#135 Placeholder (M/S – Milestone Dates)” with any milestones necessary to control the Standard Batch Implementation Sub-project.
 - Replace “#136 Placeholder” with any activities, tasks, subtasks, readiness determinations and milestones for starting up the Standard Batch Sub-project.
 - Replace “#138 Placeholder” with all activities, tasks, subtasks, readiness determinations and milestones for acceptance testing the WCDS standard batch eligibility interface.
 - Replace “#140 Placeholder” with any activities, tasks and subtasks (not included in the Alameda County work plan) for starting up the pilot and evaluation.
 - Replace “#168 Placeholder” with any activities, tasks and subtasks (not included in the county work plans) for starting up the batch county implementations.
 5. Updating The LEADER Host-To-Host Implementation Sub-project Work Plan - **EBT-LEADER**
 - Replace “#35 Placeholder (M/S - Milestone Dates)” with any milestones necessary to control the LEADER Host-To-Host Implementation Sub-project.
 - Replace “#36 Placeholder” with any activities, tasks, subtasks, readiness determinations and milestones for starting up the LEADER Sub-project.
 - Replace “#38 Placeholder” with all activities, tasks, subtasks, readiness determinations and milestones for acceptance testing the LEADER host-to-host eligibility interface.
 - Replace “#40 Placeholder” with any activities, tasks and subtasks (not included in the Los Angeles County work plan) for starting up the interface pilot and evaluation.
 - Replace “#68 Placeholder” with any activities, tasks and subtasks (not included in the Los Angeles County work plan) for starting up the Los Angeles district implementations.
 6. Updating The CalWIN Host-To-Host Interface Migration Sub-project Work Plan - **EBT-CalWIN**
 - Replace “#107 Placeholder (M/S - Milestone Dates)” with any milestones necessary to control the CalWIN Host-To-Host Interface Migration Sub-project.
 - Replace “#108 Placeholder” with any activities, tasks, subtasks, readiness determinations and milestones for starting up the CalWIN Sub-project.
 - Replace “#110 Placeholder” with all activities, tasks, subtasks, readiness determinations and milestones for acceptance testing the CalWIN host-to-host eligibility interface.

- Replace "#112 Placeholder" with any activities, tasks and subtasks (not included in the Sacramento County migration activities below) for starting up the interface pilot and evaluation.
- Replace "#114 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for migrating Sacramento County from the WCDS batch eligibility interface to the CalWIN host-to-host eligibility interface.
- Replace "#116 Placeholder" with any activities, tasks and subtasks (not included in the county migrations below) for starting up the county migrations.
- Replace "#118-167 Placeholders" with all activities, tasks, subtasks, readiness determinations and milestones for migrating the counties from the WCDS batch eligibility interface to the CalWIN host-to-host eligibility interface.

7. Updating The ISAWS Host-To-Host Implementation Sub-project Work Plan - **EBT-ISAWS**

- Replace "#232 Placeholder (M/S – Milestone Dates)" with any milestones necessary to control the ISAWS Host-To-Host Implementation Sub-project.
- Replace "#233 Placeholder" with any activities, tasks, subtasks, readiness determinations and milestones for starting up the ISAWS Sub-project.
- Replace "#235 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for acceptance testing the ISAWS host-to-host eligibility interface.
- Replace "#237 Placeholder" with any activities, tasks and subtasks (not included in the San Joaquin County work plan) for starting up the pilot and evaluation.
- Replace "#265 Placeholder" with any activities, tasks and subtasks (not included in the county work plans) for starting up the ISAWS county implementations.

8. Updating The C-SAWS Host-To-Host Implementation Sub-project Work Plan - **EBT-CIV**

- Replace "#31 Placeholder (M/S – Milestone Dates)" with any milestones necessary to control the C-IV SAWS Host-To-Host Implementation Sub-project.
- Replace "#32 Placeholder" with any activities, tasks, subtasks, readiness determinations and milestones for starting up the C-IV Sub-project.
- Replace "#34 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for acceptance testing the C-IV host-to-host eligibility interface.
- Replace "#36 Placeholder" with any activities, tasks and subtasks (not included in the county migrations below or the Merced County implementation work plan) for starting up the county implementations.
- Replace "#38 Placeholder" with all activities, tasks and subtasks for migrating Riverside County from the legacy batch eligibility interface to the C-IV host-to-host eligibility interface.
- Replace "#40 Placeholder" with all activities, tasks and subtasks for migrating Stanislaus County from the legacy batch eligibility interface to the C-IV host-to-host eligibility interface.

9. Updating The Statewide Implementation Work Plan - **EBT-SIP**

- Replace "#42 Placeholder (M/S – Milestone Dates)" with any milestones necessary to control the statewide implementation of EBT.

- Replace "#43 Placeholder" with any activities, tasks, subtasks, readiness determinations and milestones for starting up the statewide implementation of EBT.
- Replace "#46 Placeholder" with any central administrative activities, tasks, subtasks, readiness determinations and milestones for implementing EBT statewide.
- Replace "#48 Placeholder" with any central planning activities, tasks, subtasks, readiness determinations and milestones for implementing EBT statewide.
- Replace "#50 Placeholder" with any central implementation activities, tasks, subtasks, readiness determinations and milestones for implementing EBT statewide.
- Replace "#53-#95 Placeholders" with any regional administrative, planning and implementation activities, tasks, subtasks, readiness determinations and milestones for implementing EBT in counties within the respective regions.
- Replace "#97 Placeholder" with the scheduled weekly Implementation Status Meetings.
- Replace "#100 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for finalizing the implementation plan and schedule deliverables.

10. Updating The Project Management Work Plan - *EBT-PMP*

- Replace "#12 Placeholder (M/S – Milestone Dates)" with any milestones necessary to control the EBT project.
- Replace "#13 Placeholder" with any activities, tasks, subtasks, readiness determinations and milestones for starting up the EBT project.
- Replace "#15 Placeholder" with any EBT administrative activities, tasks, subtasks, readiness determinations and milestones.
- Replace "#17 Placeholder" with the scheduled weekly Project Status Meetings.
- Replace "#19 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for finalizing the project management plan and schedule deliverables.
- Replace "#27 Placeholder (M/S – Milestone Dates)" with any milestones necessary to control the EBT design phase.
- Replace "#28 Placeholder" with any activities, tasks, subtasks, readiness determinations and milestones for starting up the EBT design phase.
- Replace "#30 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for completing joint application development (JAD) and JAD meetings.
- Replace "#32 Placeholder" with all EBT system design activities, tasks, subtasks, readiness determinations and milestones.
- Replace "#34 Placeholder" with all Standard Batch Eligibility Interface design activities, tasks, subtasks, readiness determinations and milestones.
- Replace "#36 Placeholder" with all Standard Host-to-Host Eligibility Interface design activities, tasks, subtasks, readiness determinations and milestones.
- Replace "#45 Placeholder (M/S – Milestone Dates)" with any milestones necessary to control the EBT development phase.
- Replace "#46 Placeholder" with any activities, tasks, subtasks, readiness determinations and milestones for starting up the EBT development phase.
- Replace "#48 Placeholder" with all EBT system development activities, tasks, subtasks, readiness determinations and milestones.
- Replace "#50 Placeholder" with all Standard Batch Eligibility Interface development activities, tasks, subtasks, readiness determinations and milestones.

- Replace "#52 Placeholder" with all Standard Host-to-Host Eligibility Interface development activities, tasks, subtasks, readiness determinations and milestones.
- Replace "#54 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for completing the EBT functional demonstration.
- Replace "#56 Placeholder" with all activities, tasks, subtasks, readiness determinations and milestones for completing the EBT system acceptance test.
- Replace "#58 Placeholder" with any central implementation activities, tasks and subtasks not included in the subproject work plans.